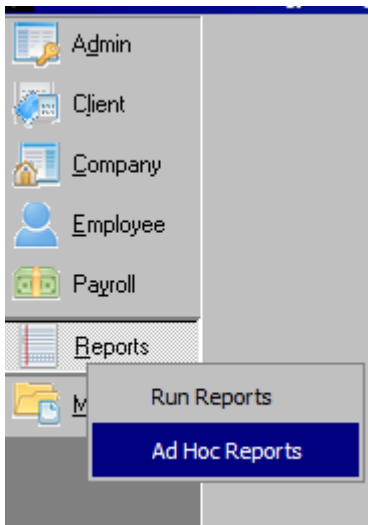# Ad Hoc Reports

Ad Hoc Reports give you the flexibility of creating a custom report on the fly with the functionality of exporting the data to a file. Ad Hoc Reports can be customized to show as many columns of information as the user wishes to show, as long as they will fit across the report.

1. Click on Reports

2. Select Ad Hoc Reports from the menu

3. To start a new report, Click on the at the top of the screen.
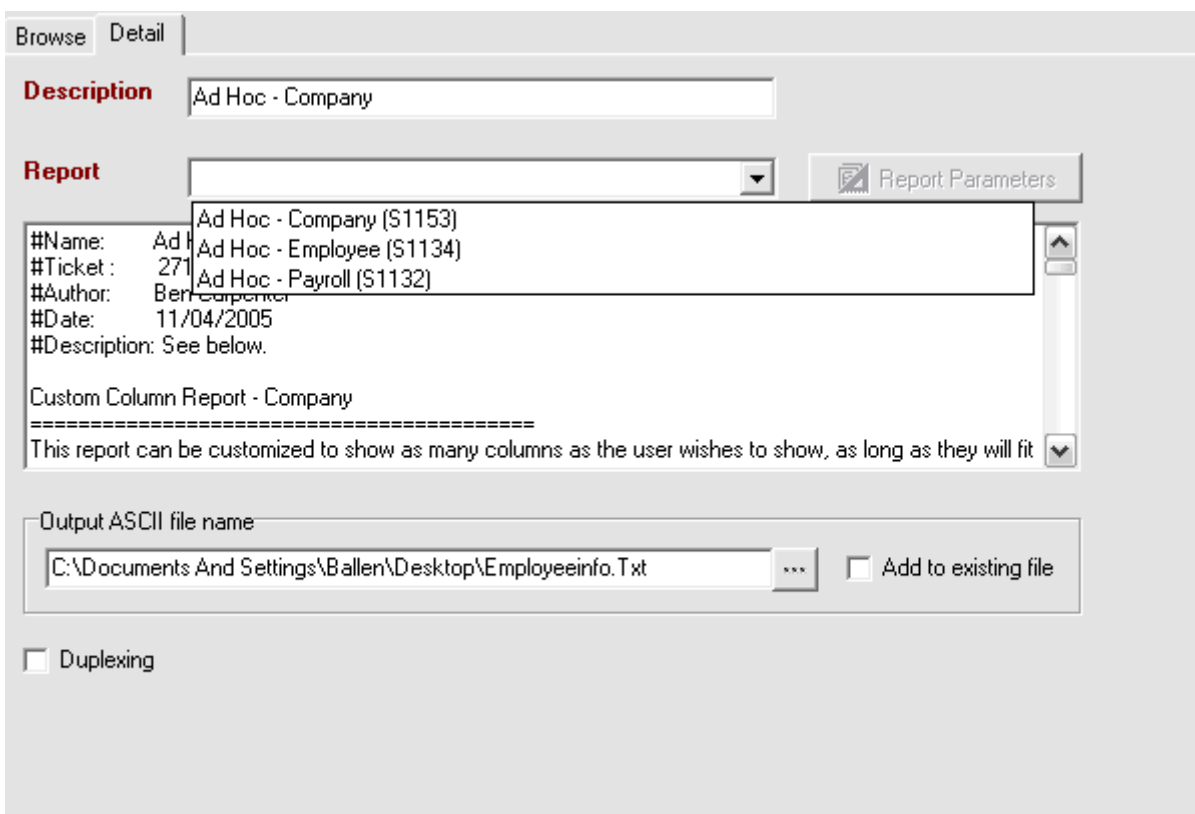
4. Click on the details tab

5. Under Report, select the type of report you would like to write.
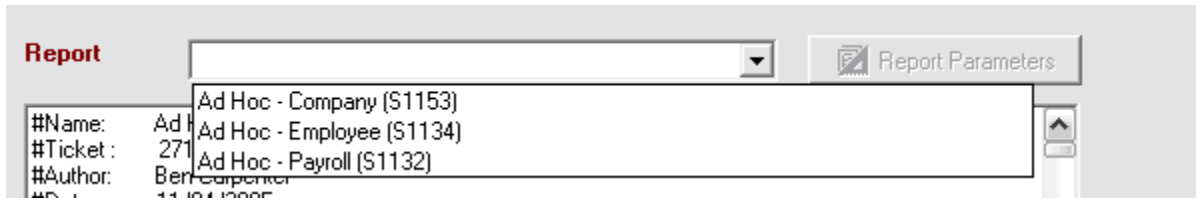
6. In the description field rename the report to give a better understanding of what is in this report.

7. Click the green check at the top of the screen to save your report.

8. Click the Report Parameters button.

9. Depending on which report you select some columns will be defaulted for you under the List of columns. You can modify, delete or add to this listing.

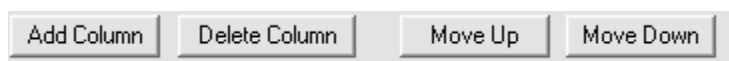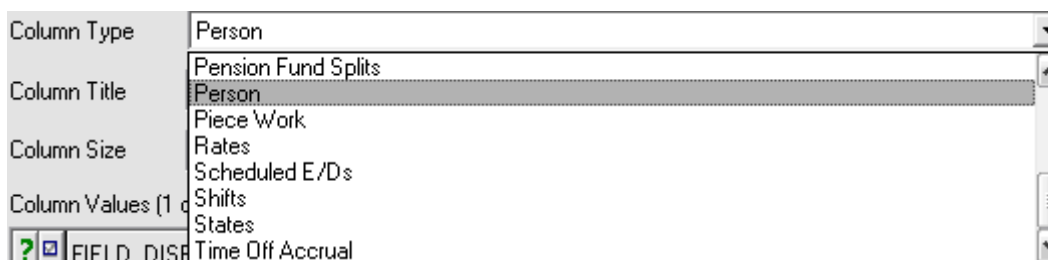10. To add or delete column, click the Add Column or Delete Column buttons located in the bottom left hand corner of the screen.

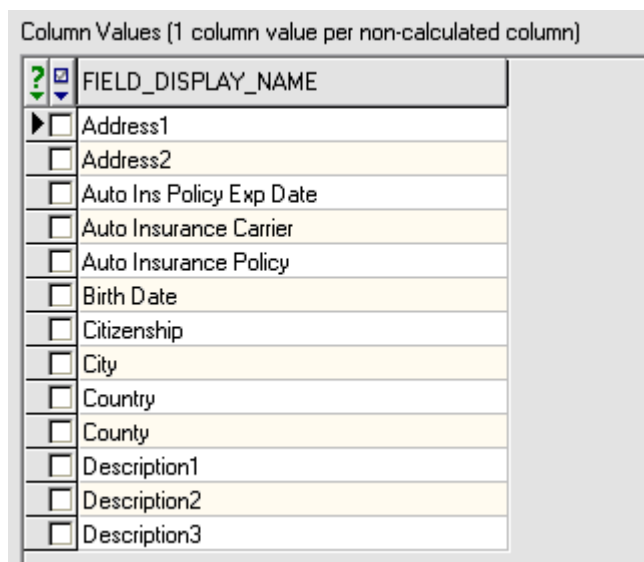| Add Column | Delete Column | Move Up | Move Down |

11. To move columns around you may move the columns up and down by clicking the Move Up and Move Down buttons

12. Under the column type you will need to select which table you would like to pull information from. For example if you are looking for an employee's birth date that would be under the Person table.

Column Type	Person
Column Title	Pension Fund Splits
	Person
	Piece Work
Column Size	Rates
	Scheduled E/Ds
Column Values (1	Shifts
	States
?□ FIELD DISP	Time Off Accrual

13. Once you select the column type , various Fields names will be displayed depending on which column type you selected.

Column Values (1 column value per non-calculated column)

?□	FIELD_DISPLAY_NAME
▶□	Address1
□	Address2
□	Auto Ins Policy Exp Date
□	Auto Insurance Carrier
□	Auto Insurance Policy
□	Birth Date
□	Citizenship
□	City
□	Country
□	County
□	Description1
□	Description2
□	Description3

14. Click the check box next to the field you would like to see in the column. Each column may only have one value or field in it. If you select more than one field whichever field comes first in the listing will print on the report and all others will be omitted.
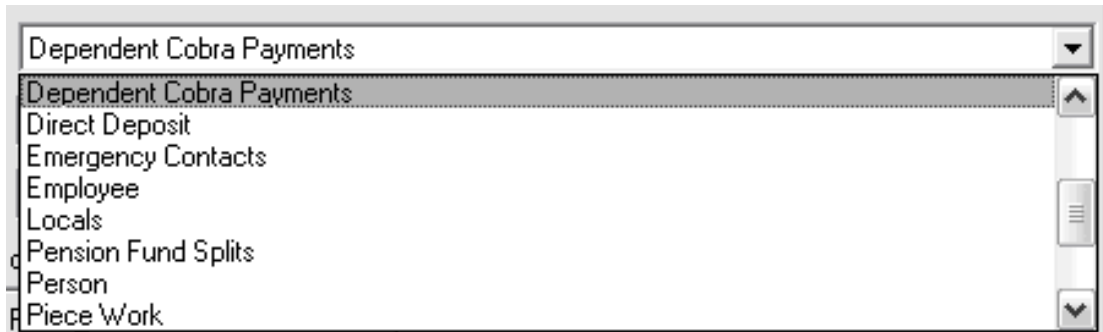
15. To define the caption or column header on the report, enter this in the Column Title box for that column.

16. To define the width of a column, enter the maximum number of positions allowed to print in that column in the Column Size text box. For a paper report, this number will not be exact due to the varying widths of printed characters. For the fixed-length ASCII result, this number will be exact.

17. You may want to join two columns together. This would be considered a calculated column. An example of this would be LastName, FirstName. To create a calculated column, add a new column to your report.

18. Select calculated under column type.

19. Enter into the expression field the calculations that you want the system to perform. When defining expressions for calculated columns, columns must be referenced by their Column ID. This will always be in the format of COLx, where COL is the prefix of every column ID, and x is the number of the column. The expressions are not case sensitive and spaces between parts of an expression do not matter. EX: To join columns 2 and 5 together, the expression would be: COL2 || COL5 or Col2||cOL5 or col2||Col5

Expression

COL2 || COL5

NOTE: The operator between the two column IDs is a double-pipe, or two pipe characters.   This is located on the backslash \ key on your keyboard.

20. If a comma should appear between these two columns, the expression would be as follows: COL2 || ',' || COL5. Because of this, other valid expressions which mean the same thing as COL2 || COL5 would be: col2||cOL5 or Col2 || Col5

21. If there is a column to be used in a calculated column's expression, but this column does not need to appear in the report, the Invisible Column check box should be checked for that column. This makes the data that would appear in this column available for use in the expressions of calculated columns, without occupying space on the report.

22. To select employees that will be shown in this report or file, click on the employee tab and check the box next to the employee's name. If no employees are selected then the file will run for all employees.

|	EE Code	SSN	First Name	Last Name
	1	009-40-9839	Bob	Jones
	2	009-42-2564	Robert	Orr
	3	003-66-7119	Ethelyn	Dubuque
	5	009-40-9839	Bob	Jones
	14	017-28-5119	Dorothy	Neuberger
	26	009-24-0235	Mary Lew	Collins
	30	021-45-6987	Vera	Mihailova
	31	132-34-5674	Laurie	Thompson
	54	049-38-0734	Mary	Pepe
	68	130-36-9881	Jean	Shappee
	98	012-26-3006	Joyce	Nourse

Columns | Select EEs | Misc

23. To sort the results of the report, Click on the Misc tab. Enter the column numbers of the columns which you wish to sort on, in the order in which they are to be sorted, separated by commas. EX: To sort on columns 3, then 4 then 1, enter the following text in the Sort By box :   3,4,1

NOTE: The Ad hoc Payroll (S1132) report only allows sorting to take place on DBDT (Division, Branch, Department, Team) .
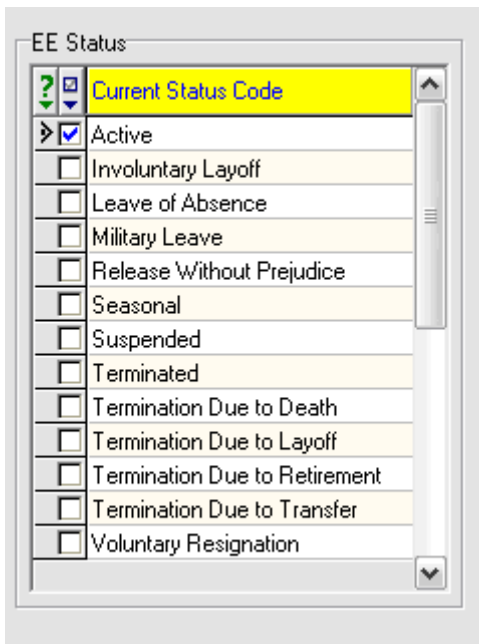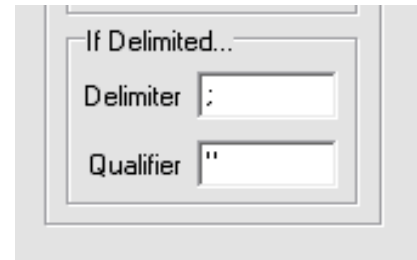
☑ Print ASCII Result

24. To produce an ASCII result, click the check for Print ASCII Result check box.

25. If print the column headers box is checked, the first line in the file will show the captions entered for each column.

☑ Print Column Headers

File Type
○ Fixed Length
● Delimited
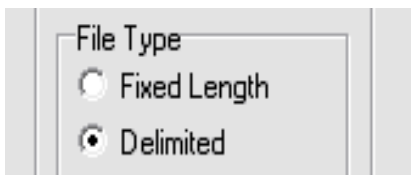
26. If you are making this an ASCII report you will want to selected delimited or fixed length.

27. If you select delimited, you have the ability to choose what symbol is used for the delimited file.

If Delimited...
Delimiter ;
Qualifier "

EE Status

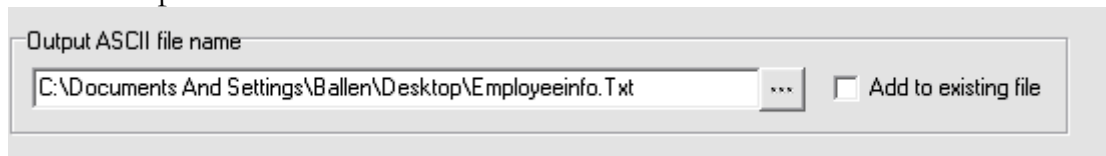| ?	▣	Current Status Code
▷	☑	Active
	☐	Involuntary Layoff
	☐	Leave of Absence
	☐	Military Leave
	☐	Release Without Prejudice
	☐	Seasonal
	☐	Suspended
	☐	Terminated
	☐	Termination Due to Death
	☐	Termination Due to Layoff
	☐	Termination Due to Retirement
	☐	Termination Due to Transfer
	☐	Voluntary Resignation

28. You can determine which employees to run this report for by selecting the particular Current Status Code. On the misc tab under Current Status code, click the check box next to each status code that this report should be looking at.

29. Once you have completed a column click the apply changes button to save all of your settings.

30. Once you have completed all of your columns and applied all of the changes you can click the OK button on the columns tab.

31. To save all of your settings click the green check at the top of the screen.

32. To specify where you would like your ASCII file to be saved you may enter an ASCII output file name and location.

Output ASCII file name
C:\Documents And Settings\Ballen\Desktop\Employeeinfo.Txt ... ☐ Add to existing file

33. Once saved, Click on the Browse tab and Click Run reports.